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Inside this Issue

- 1 About the Australian Water Industry
- 2 Ozwater 2003
- 3 Greener Golf Courses
- 4 The Market for Domestic Water Treatment Systems
- 5 Major Water and Wastewater Projects
- 6 Distributor Profiles

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OZ ENVIRO

Australian Environmental Bulletin

U.S. Commercial Service, Australia

Welcome

to the Australian Environmental Bulletin

This publication contains useful business intelligence on the Australian environmental market.

This issue spotlights water and wastewater, the largest sector of the Australian environmental industry.

For further information on the articles in this publication or on any aspect of the Australian environmental market, please contact:

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The Water Industry in Australia

Australia has several hundred water treatment plants with a water supply capacity of about 17,000 megaliters per day. Approximately 85 percent of the population currently have access to more than 700 community sewage treatment plants. Nearly half of these are based on biological filters, about 170 are lagoons, and 45 are based on primary treatment. Most new plants are implementing activated sludge processes.

In the past, State Government-owned utilities have been the primary managers of wastewater treatment plants. Public utilities still, by far, represent the main purchasers of wastewater treatment equipment. However, reform has resulted in the corporatization of a number of utilities, creating increased opportunities for private sector delivery of water and wastewater services. Most notably, water authorities have begun outsourcing the management and maintenance of existing water treatment plants. Private sector interests are now creating new plants under "build-own-operate" contracts.

The trend towards increased private sector ownership of wastewater infrastructure is likely to continue primarily because of the lack of funds available to public water and wastewater authorities. The sewerage systems in most of Australia's major cities are old and overloaded. Large increases in capital expenditure are needed simply to address sewer capacity and condition rather than treatment.

The value of water and wastewater projects currently under construction in Australia is US\$1.4 billion. Significant expenditure by the water authorities will continue in the traditional purchase areas of pipelines, storages, clean-up projects, pump stations and treatment plants.

Ozwater Exhibition 2003

The Australian Water Association is organizing the Ozwater Conference and Exhibition to be held at the Burswood Dome in Perth from April 6-10, 2003.

The Ozwater Exhibition is Australia's major showcase of water industry science, technology and innovation. With space to accommodate 120 exhibitors, the show is expected to attract 850 convention delegates and 500 trade visitors from around Australia and Asia.

For more information on the Convention or Exhibition, please contact:

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The Water Industry in Western Australia

Western Australia (WA) is an important engine for the growth of Australia's industry, trade and investment. WA covers the resource-rich western third of Australia. It is a major world source of a wide range of commodities and its manufacturing and services sectors are expanding as well. Approximately 1.8 million people live in the State with an area of 2.5 million square kilometers.

One of the most significant environmental issues facing WA is the salinization of the State's land and inland waters. Land salinization has severely damaged the environment and reduced agricultural productivity. Salinization of inland waters has altered aquatic ecosystems, and reduced biodiversity and the supply of potable water. A major challenge for the Government is to protect and restore key water resources to ensure that salinity levels do not threaten the continuing supply of potable water.

Golf Courses set to become Greener

Golf courses have strongly relied on chemicals since the 1950s, when the use of modern pesticides became common. In recent years, however, best practice in golf course management has moved away from the chemical-based strategies of the past, due mainly to government regulation and concern for the environment.

Golf courses are set to become even greener under a new scheme put together by the NSW Environment Protection Authority (EPA) and the Australian Golf Course Superintendents' Association. The two groups are in the process of conducting a number of workshops as part of the project, called "Improving the Eco Efficiency of NSW Golf Courses."

In a recent media release, EPA Director General, Ms. Lisa Corbyn stated, "Golf courses rely heavily on fertilizer and pesticide applications and are large water users, which can potentially cause serious environmental damage if not managed effectively. This Urban Stormwater Education initiative is funded by the Stormwater Trust. The EPA is working with the Australian Golf Course Superintendents' Association to design and create a training course. The workshops promote sound environmental practice and will provide golf course superintendents with a forum for detailed discussion on environmental issues." This initiative is expected to promote cleaner production approaches to stormwater management in golf courses.

Further information on stormwater management for golf courses is available on the EPA website at www.epa.nsw.gov.au/stormwater/whatdo/local+councils/golf.htm

The Australian Golf Course Superintendent's Association (AGCSA) was formed in 1981 and has over 700 members. Its aim is to promote the profession of golf course management in Australia and the Pacific Rim. More information on the association can be found at www.agcsa.com.au

The Market for Domestic Water Treatment Systems

The market for domestic water treatment equipment in Australia is small but competitive with many local and overseas manufacturers. However, many distributors of water filters believe that the market is growing and that there is room for either a new type of water treatment product or an existing product that is price-competitive.

The total market for domestic water treatment equipment in 2002 has been projected to be US\$52 million. The market has been growing at an estimated rate of 15 percent and is likely to continue to grow at this rate for the next two years. Some of the reasons for this rapid growth include:

- A largely untapped customer base. Water filters are still not common items in Australian households.
- Past concerns associated with the contamination of Sydney's water supply. In 1998, Sydney experienced a high-profile contamination of its water supply by giardia and cryptosporidium. This problem fueled a temporary increase in the rate of demand for household water treatment systems.
- Changing customer tastes. Some households may be either trying to avoid the chemicals, such as chlorine and fluoride, used by water utilities or at least remove the taste of such chemicals.

The estimated growth in the domestic water purification market is also supported by the growth of the bottled water market. Bottled water appears to be the fastest growing sector of the Australian beverage industry and has expanded in the last few years by 10-20 percent.

While the proposed advantages and unique features of water treatment systems are important for consumers to consider, price is still the main selling factor.

Possible Water and Wastewater Treatment Projects

| State | Agency/Company | Value US\$m | Project |
|-------|--|----------------|--|
| NSW | Dept. of Land & Water Conservation | 22 | Keepit Dam upgrade |
| VIC | VIC Government | 40 | Grampians water upgrade |
| VIC | VIC Government | 40 | Ballarat Water Treatment |
| VIC | VIC Government | 40 | Bendigo Water Treatment |
| VIC | Wimmera Mallee Water | 165 | Open channel-to-pipeline conversion |
| VIC | Melbourne Water | 94 | Upgrade of Eastern Treatment Plant |
| VIC | VIC Dept. State & Regional Development | 67 | Upgrade of 23 Victorian dams |
| QLD | QLD Government | 100 | Paradise Dam, Burnett River |
| WA | WA Water Corporation | 44 | Desalination Plants in 30 towns |
| WA | WA Water Corporation | 25 | Desalination Plant, Pilbara |
| WA | WA Water Corporation | 11 | Kemerton wastewater treatment plant |
| WA | WA Water Corporation | 11 | Kwinana water filtration plant |
| WA | Austeel/Marubeni | 28 | Desalination plant in Cape Preston |
| WA | Goldfields Utilities | 468 | Plant and pipeline to pump desalinated water to Goldfields region. |

Distributor Profiles

All Pumps Sales & Service

Mr. Stephen Hales, Manager

Phone: 61-2-9683 5555

Fax: 61-2-9630 0369

PO Box 6565

Parramatta Business Center, NSW 2150

Line of Business:

Product Description: Pump merchants and suppliers of pollution wastewater systems.

ANCO Australasia Pty Ltd

Mr. Brian White, Marketing Director

Phone: 61-2-9748 3544

Fax: 61-2-9748 3677

PO Box 6365

Silverwater, NSW 2128

Line of Business:

Product Description: Manufacturer and supplier of industrial water treatment chemicals and equipment.

Australian Ultra Violet Services (Operations) Pty Ltd

Mr. John Sly, Managing Director

Phone: 03-9464 3855

Fax: 03-9464 3866

23 Northgate Drive

Thomastown, Victoria 3137

Product Description: Manufacturer of ultraviolet technology for air and water purification.

Halley & Mellowes Pty Ltd

Mr Murray Shear, Managing Director

Phone: 61-2-4388 4522

Fax: 61-2-4388 5442

PO Box 5010

Chittaway, NSW 2261

Product Description: Manufacturers of industrial equipment and representatives for overseas manufacturers.

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